



## Letter of Authorization for Stock Transfers

The Letter of Authorization below is provided for your convenience.

If you are transferring stocks to St. Andrew's Presbyterian Church, which are currently held in your brokerage account, please complete the letter and follow these instructions:

1. All parties on the account(s) must sign the letter.
2. Please complete this form in its entirety and **fax or email to your broker or trustor**.

**For identification and receipting purposes, it is imperative for St. Andrew's Presbyterian Church to receive a copy of your Letter of Authorization.** (Please send to [jonb@sapres.org](mailto:jonb@sapres.org).)

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Today's Date

Name and Address of Delivering Broker

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. My account number is: \_\_\_\_\_.

1. \_\_\_\_\_ shares of \_\_\_\_\_
2. \_\_\_\_\_ shares of \_\_\_\_\_
3. \_\_\_\_\_ shares of \_\_\_\_\_

Please deliver all eligible stocks to:

Charles Schwab  
2020 Main Street, Suite #160  
Irvine, CA 92614-8228

For the account:

St. Andrew's Presbyterian Church      Tax ID: 95-1969024  
Account No.: 8410-3548      DTC No.: 0164  
Branch Phone: 949.955.4099      Fax: 888.526.7252

*Shares should be transferred in kind and are not to be liquidated.*

My intention is to gift these stocks to St. Andrew's Presbyterian Church. If you have any questions or if there is a problem with this transfer, please contact me immediately at: \_\_\_\_\_ (phone).

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Donor Name and Mailing Address

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Full Name (Please Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Full Name (Please Print)

**Giving Fund:**    General

Other  \_\_\_\_\_

Unidentified gifts are placed in the general fund.

600 St. Andrews Rd, Newport Beach, CA 92663 | Phone: 949.631.2880 | Fax: 949.631.2881 | [info@sapres.org](mailto:info@sapres.org) | [sapres.org](http://sapres.org)